FINANCIAL GROOVE

Documents You Will Need

where applicable

PERSONAL INFORMATION

Completed Income Tax Interview Form
Last Year's Federal and State Tax Returns
Proof of Identity
Social Security Cards for all individuals listed on the return

INCOME AND TAX INFORMATION:

W-2's
1099-INT - Interest
1099-DIV - Dividends
1099-B - Stock Sales
1099-G - State Income Tax Refund
1099-R - Pension Income
SSA-1099 or RRB-1099 - Social Security or Railroad Retirement
1099-R - IRA or 401(k) Distribution
1099-G - Unemployment Compensation
1099-MISC - Miscellaneous Income
W-2G - Gambling or Lottery Winnings
Schedule K-1 – Income from Partnerships, S Corps, LLCs, Trusts, and Estates
Self-Employment Income
Sale of a Personal Residence
Sale of any Business Assets
Commissions Received
Income from Rentals
Alimony Received

DEDUCTIONS/ADJUSTMENTS:

Casualty or Theft Losses
Charitable Contributions – Cash and Non Cash
Educator Expenses
Employee Business Expenses
Estimated Taxes
Foreign Taxes Paid
Lottery or Gambling Losses
Medical, Eye Care, and Dental Expenses
Mortgage or Home Equity Loan Interest Paid - Form 1098
Moving Expenses
Real Estate or Personal Property Taxes
Record of Purchase or Sale of Residence
State or Local Sales Taxes Paid
Student Loan Interest - Form 1098-E
Traditional IRA Contributions
Tuition and Education Fees - Form 1098-T
Child Care Expenses & Provider Information
Adoption Expenses
Retirement Savings Contributions